

BRIEF INSTRUCTIONS
AGENCIES WITH PROPOSED CAPITAL PROJECTS*
AND WHOSE PLANS ARE SUBMITTED DIRECTLY TO CPAB

Only the designated Agency Contact can do the shaded items (#4, #6 and #9).

1. Go to www.lrc.ky.gov/statcomm/CPAB/homepage.htm (the Capital Planning Advisory Board web page) and click on [Capital Planning System](#)
 2. Under “Account Login” type your e-mail address and password, and click on [Login]
 3. On the SELECT PLAN page, click on [Select] to the left of Plan 2012-2014, Version 1
 4. **Respond to all questions on the Plan Checklist and click on [Save Changes]**
Only the individual who has been identified to the Capital Planning Advisory Board as the Agency Contact can access the Checklist.
 5. **From the SELECT OPTION page, [Select] and complete each form listed under Forms-Background, Forms-Plan, and Forms-Ancillary Records**
The forms listed here will be based on responses provided on the Checklist. They are the only forms the agency is to complete.
 6. **From the SELECT OPTION page, under Agency Contact Functions, [Select] “Set Agency Level Priorities” to assign Agency Priority numbers to proposed projects**
 7. **From the SELECT OPTION page, under Agency Level Reports, [Select] “View/Print Form Reports” to review and/or print the reports for the forms that have been completed**
This function is for the agency’s convenience only. Hard copies of the forms/reports are *not* to be sent to CPAB.
 8. **From the SELECT OPTION page, under Agency Level Reports, [Select] “View/Print Validation Reports” then choose [View/Print] to see the report for each form listed**
The report will identify missing or otherwise problem data in the form as currently completed. All “Validation Errors” listed on each report (as described on the "Message Explanations" report) must be corrected before moving to the final step, which submits the agency plan to CPAB.
 9. **From the SELECT OPTION page, under Submit Plan, [Select] “Submit Plan to CPAB”**
After ensuring that all of the required validations have been completed, the system will notify CPAB that the agency’s plan has been transmitted electronically and prompt the user to print a hard copy “Transmittal Notification” that is to be signed by agency head and mailed to the CPAB office.
- (At this point, the agency’s plan will be “read-only.” Changes cannot be made until the agency has been notified that the initial review by CPAB staff has been completed.)*
10. **Forward (via USPS or messenger) the signed “Transmittal Notification” to the CPAB office**

*Proposed Capital Projects are items that meet any of the following criteria:

- Capital construction with an estimated cost of \$600,000 or more
- Equipment items with an estimated cost of \$200,000 or more (postsecondary education scientific or research equipment is to be submitted for 2012-14 only)
- Information technology system with an estimated cost of \$600,000 or more
- State-administered grant/loan program included in the capital budget that provides financial assistance to non-state agencies or entities
- Court facility where the annual use allowance for new or renovated space is \$200,000 or more